Selling a Membership in AMS

- 1. Log in to Agile Ticketing Solutions with your username and password. If you haven't received your user credentials, please contact your system administrator to set up your username and password.
- 2. Make sure that you are cashed in before starting sales for the day.
- 3. Click on the "Customer" icon to search for a customer account.



4. Search to see if they already have a customer record. You can search by Last Name, Email address, or Customer Number to see if their customer record is already on file. A list of customer records will appear if they are already in the system. Double click on their customer record if their name appears in the list.

| ast Name | agle | City: | | | Member 2 | t I | | | |
|-------------|--------------------|------------------|--------------|--------|---|-------|--------------------|-------|--------|
| inst Name: | | State: | | * | Members | No T | * | | |
| hone | | Zø | | | | 1 | Exact Name Match | | |
| mait | | Customer # | | | | | karch For Business | | |
| lecords Per | Page 20 👌 | Search | | | | | Disabled Customer | | |
| LastName | Fest Name | Customer # | Street 1 | City | | kate | Zp | Paret | Name |
| - Agle | EM. | 23718 | 4124 Central | HERN | | IN . | 37076 | | |
| Agle | Overy | 23636 | 4124 Central | | | TN . | 37076 | | |
| elge | Christy | 23637 | 4124 Central | Hernit | | IN. | 30076 | | |
| Aple | H. | 23722 | 4124 Central | | | IN | 37076 | _ | _ |
| Agle | Mary | 23640 | 4124 Central | Here | and the second se | IN IN | 37076 | | - |
| Agile | Meinda | 23542 | 4124 Central | | 1.50 | IN. | 37076 | | |
| | | | | | | | | | |
| | Sustomer has order | s View Add Ne | 27 | | | | | ĸ | Cancel |

5. If the customer is new, you will need to create a new customer account by clicking on **"Add New"**.

| 4 | | | Cus | tomer S | earch | | |
|----------------|-------------------|------------|----------|---------|-------------|---------------------|-------------|
| Last Name: | | City: | | | Member # | _ | |
| First Name: | | State: | | v | Membership | | ~ |
| Phone: | | Zipi | | | Constant of | Exact Name Match | 2 |
| Email: | | Customer # | | | | Search For Business | 27.0 |
| Records Per P | age: 20 🔹 | Search | | | | Disabled Customer | 100 |
| LastName | First Name | Customer # | Street 1 | City | State | Zp | Parent Name |
| | | | | | | | |
| * indicates cu | slomer has orders | | 1 New | | | | |

6. Once you click **"Add New"** the **Quick Add Customer** box will show up where you will fill in the customer's information. Once you have captured all of the customer's information, click on **"OK"**

| 3 | | | | Quick / | Add (| Custor | ner | | | | |
|---------|------------|--------|----------------------------------|----------|--------|-----------|----------|--------------|------------|---------|--------|
| General | Question | n/Answ | er | | | | | | | | |
| Bus | siness | | | | | | | | | | |
| Prefix | | First* | John | Middle | L | | Last" | Smith | | Suffix | |
| Email | | | | | | | Receive | email relate | d to Agile | Demo. | |
| | | | | | | | Receive | email relate | d to Agile | Theatre | 1 |
| | - T 6 | xempt | F () T (D | | | | | | 1000740 | | |
| Biling | Address | xempt | Federal Tax ID | | | | Stat | e Tax ID | | | |
| Count | | | United States | | | | ~ | | | | |
| Addre | ss 1* | | 1313 Mockingbird L | ane | | | | | | | |
| Addre | ss 2 | | | | | | - | | | | |
| City* | | | 1 | | | | | | | | |
| State | / Province | • | | ¥ | | | | | | | |
| Zip* | | | | | | | | | | | |
| Phone I | Number | Prima | av | | ~ | | | | | | |
| | | (|)])]-[| 1. | | | | | | | |
| | | 1 | | ext. | _ | | | | | | |
| | | | | Add With | Incomp | olete Inf | ormation | | ОК | | Cancel |
| _ | | _ | | | _ | _ | _ | | | | |

Note: Everyone is a customer but not all customers are members.

7. Once you have selected a customer's account, select the **"Membership"** tab on the left side of the screen. Then you will need to select the membership program from the list underneath. This will allow you to see all the membership programs to choose from.

| File View Action Ticket Printer Sales | Mode Support Functions Help |
|---|-------------------------------|
| Sales Maintenance Point Of Sale | Clear Order Override Customer |
| Agile Theatre | 🕦 🧞 Customer #: 23541 |
| AMS - BoxOffice 🗸 🗸 | Billing Address |
| Optional Customer Classification | Joe Agile |
| | 4124 Central Pike |
| Catalon Depation Event Gift Card Membership Season | Hermitage, TN 37076 |
| AT Membership (ATM) | Restricted Prices |
| Passes (pass) | Name |
| | Film Circle |
| | Flex Season |
| 1 | [] //mage 3 |

8. Choose the membership program on the right. When selling a membership, make sure your restricted prices is checked in order to see all pricing options.

| Sales Maintenance Point Of S | ale Clear Order Override Custome |
|--|---|
| Agile Theatre AMS - BoxOffice Sptional Customer Classification Catalog Donation Event Gift Card | Customer #: 2354 Billing Address Joe Agile 4124 Central Pike |
| Membership Season AT Membership (ATM) Passes (fpass) | Hermitage, TN 37076 |

9. Select the membership price you want to sell to the customer. Then add the quantity of memberships the customer wants to purchase.

| Sales Maintenance Point Of Sale | Clear Order Override Customer Member | Remove Contact Item List | | 6 | |
|---------------------------------------|--------------------------------------|--------------------------------|------------------|---------------------------|--------------------|
| MS - BoxOffice | | | | ~ | |
| Optional Customer Classification- v | Billing Address Joe Agile | | | Shipping Add Joe Agile | |
| stalog Donation Event Gift Card | - 4124 Central Pike | | | 4124 Centra | 2.045.95A |
| lembership Season | Hermitage, TN 37076 | | | Hermitage, | TN 37076 |
| | Restricted Prices | | | | |
| AT Membership (ATM) vasses (fpass) | Name | | Sales Line | Туре | |
| | Film Circle | | Club | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | Membership Type (Level) | Membership Length | Price | Service Fee | Subtota |
| | Membership Type (Level) | Membership Length 12 Months | Price \$45.00 | Service Fee \$0.00 | Subtota \$45.00 |

Note: If you are adding a membership for the first time, make sure not to select a membership category with **renewal** in the price name.(See instructions on "How To Renew A Membership")

10. After selecting the membership type and quantity, click "**Proceed**" in the lower right corner.

| ia Tauter | Pore: E-nal | | Ze | | | | | |
|--|--|-------------|---|--------------|---|--|---|--|
| 5 BuOfice - storal Castoner Classification | Start Date Thu . No 19 2015 (D+) Inve | visury Open | Y CALTere CRestand Proces | 29 999 (0) | | | | |
| nbento Seaso ang Denaso Gret Git Cast Ins (P) Notches (NP) | Alama Agin Quesa Agin Quesa Agin Quesa Agin Quesa Agin Quesa Agin Buer | | Day Date Thu Dis 28, 2015 12:00 PM FH Dis 30, 2015 7:00 PM Sar Dis 31, 2015 7:00 PM Sar Nev 1, 2015 7:00 PM Sar Dis 32, 2015 7:00 PM Sar Dis 32, 2015 7:00 PM | | Duration 21:01 21:01 21:01 21:01 21:01 | Verse Gestal Pille Greens Destal Pille Greens Destal Pille Greens Destal Pille Greens Destal Pille Greens | 05 200 200 200 200 200 200 200 | Sele Status On Sale On Sale On Sale On Sale On Sale |
| Nuta (FFS) | Agle Ballet Agle Ballet Agle Ballet | | West Dec 2 2015 700 PM Thu: Dec 3 2015 700 PM Fit: Dec 4 2015 700 PM | | 21.04 | Central Pilos Corena Central Pilos Corena Central Pilos Corena | 548 548 548 | On See On See |
| | Balcony - Reserved Advises on Acut SHES | | 40 40 50 0 50 0 | | | | | |
| Sauch 🖲 🗐 📑 | | | | Express Sale | | Add Proceed | > Pay >> | |
| Merch Image: Control of the control of th | | | | | | | | end; Par |

11. A window will pop up asking you to assign the membership to the member's name. Click on the name for the account you are working on and then click **"OK"**.

| Member # 575 | | | |
|---------------------|-----------------|----------|--|
| Joined Date Wedn | esday. February | 25, 2015 | |
| Expirating Date Mon | day , February | 29, 2016 | |
| Enabled | | | |
| Barcode (optional) | | | |
| Approved | | | |
| Notes | | | |
| | | | |

Note: Some memberships allow more than one person to be assigned to it. Make sure to click the **plus** sign to add a second customer to those memberships that allow multiple members.

| A Upda | ate Film Circle - Film Buff | × |
|-----------------|-----------------------------|----------|
| Customers 🕂 💥 👕 | ₽ 🏖 | |
| Name | Customer ID | |
| Jerry Smith | 23705 | |
| | | (Image 7 |

12. The next screen is an **Item Summary** screen where you can review your order before processing a payment and finalizing an order.

| Sales Maintenance Point Of Sale | Clear Order Override | Customer Member | Remove Co | 22 ontact | Item List Pay | ment | | | |
|---|----------------------|---------------------|-----------|-----------|---------------|----------|----------------|-------------|-----------|
| Agle Theatre 🗸 🗸 | 🕕 🐉 Custome | r #: 23541 | | | | | | | |
| AMS - BoxOffice v | Billing Address | | | | | | hipping Addres | | |
| Optional Customer Classification- v | Joe Agile | | | | | | oe Agile | | |
| | - 4124 Central Pike | | | | | 4 | 124 Central P | ike | |
| Catalog Donation Event Gift Card Membership Season | Hermitage, TN 37076 | | | | | ł | lermitage, TN | 37076 | |
| | 対 item Summary | | | | | | | | |
| AT Membership (ATM) Passes (pass) | Sales Line Type | Membership | Member # | Price | Service Fee | Delivery | Expires | Transaction | Fulfilled |
| rasses (pass) | 5 Festival Pass | Special Access Pass | | | | | | | |
| | - Industry | Joe Agile | 558 | \$0.00 | \$0.00 | | 12 Months | 37899 | |
| | - Industry | Joe Agile | 559 | \$0.00 | \$0.00 | | 12 Months | 37899 | |
| | - Industry | Joe Agile | 556 | \$0.00 | \$0.00 | | 12 Months | 37899 | |
| | - Industry | Joe Agile | 557 | \$0.00 | \$0.00 | | 12 Months | 37899 | |
| | Sponsor | Joe Agile | 560 | \$0.00 | \$0.00 | | 12 Months | 37099 | |

13. Once you confirmed everything on the **Item Summary** screen is correct, click **"Proceed"** in the lower right hand corner.

| Add Decendar De | Circura Cala | Add Downed a |
|-----------------|--------------|--------------|
|-----------------|--------------|--------------|

14. The **Change Delivery Methods** window will pop up. Select the delivery method desired and then click **"OK"**.

| A | | Change Delivery Methods | | |
|---------------------------------------|---------------|--------------------------------|---------|----------|
| Desired Method Select For All: | Will Call - I | No Charge - \$0.00 | ر آس | Show All |
| Deliverable Items Special Access F | Pass | Will Call - No Charge - \$0.00 | 0 | ¥ |
| | | Ì | OK | Cancel |

15. On the payment screen select the payment method. (Example: Cash, MasterCard, Visa, Gift Card, etc.)

| Sales Maintenance Point Of Sale | Clear Order Override | Customer Member Remove | Contac | t Item Li | st Payment Ri | efund |
|---|---|---|--|----------------------|-----------------------|-------|
| MS - BoxOffice | | L 7 2000 L | | | | |
| Optional Customer Classification- | Payment Information Amount 0.00 | Summary Info Transaction Number: | | | i. |)) |
| atalog Donation Event Gift Card Aembership Season Scratch Pad Order ⊡ 36168 - 1/14/15 6:01 PM 37786 - 1/14/15 6:01 PM | Cash ✓ (Choose Method) Cash Discover MasterCard Size Expiration Date (Mo.) ✓ (Year) ✓ Security Code | Cubichel Denvely (1999) Donations Tax: Total: Minimum Due: | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | | | |
| rder #: 36168 (1) btotal: \$40.00 cket Fees: \$0.00 arvice Fees: \$0.00 elivery Fees: \$0.00 elivery Fees: \$0.00 protors: \$100.00 px: \$0.00 px: \$140.00 btotal: \$140.00 | | | | Payment Current B | Total: alance Due: | |

Note: If you are using a POS station or have a USB Credit Card swipe attached to your terminal, you can swipe the credit card and all the credit card information will populate and automatically finalize the order.

16. Click **"Apply Payment"** to complete the order.

| Amount 0.00 Cash v Document Number Card Holder Name Expiration Date (Mo.) v (Year) v Security Code | Transaction Number: Subtotal: Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations; | 37899 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | | | ,l: |
|--|--|---|------|------------------------|--------------|
| Document Number Card Holder Name Expiration Date (Mo.) V (Year) V | Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations: | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | | | |
| Card Holder Name Expiration Date (Mo.) V (Year) V | Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations: | \$0.00 \$0.00 \$0.00 \$0.00 | | | |
| Expiration Date (Mo.) V (Year) V | Service Fees: Order Fees: Delivery Fees: Donations: | \$0.00 \$0.00 \$0.00 | | | |
| Expiration Date (Mo.) V (Year) V | Order Fees: Delivery Fees: Donations: | \$0.00 \$0.00 | | | |
| (Mo.) ~ (Year) ~ | Delivery Fees: Donations: | \$0.00 | | | |
| (Mo.) V (Year) V | Donations: | | | | |
| | | \$0.00 | | | |
| Security Code | Tax | \$0.00 | | | |
| | Total: | \$0.00 | | | |
| | Minimum Due: | \$0.00 | | | |
| | | | | | |
| | | | | nent Tota ent Balar | |
| Apply Payment Finalize | \$1 \$5 \$1 | 0 \$20 | \$50 | \$100 | Exact Change |

Note: If there is no balance due on the order or you are processing a comp membership type, then you will only need to click **"Finalize"** to complete the transaction.

17. Once the order has finalized, the **Order Confirmation** page will pop up.

| | | | | Agile Ticket | ting | | |
|--|---------------------|-----------------|---|----------------|---------------|--------------------|--------|
| he order finali | zed correctly | 10 | | | | | |
| Ordert tems | Payments | Additional Info | | | | | |
| 13 | Customer # | 23705 | | | | | |
| Billing Addr | ess | | Shipe | oing Address | | Credit Info | |
| Jerry Smit | | | 1000000 | / Smith | | Credit Limit: | \$0.00 |
| ** No Info * | • | | - No | o Info 🈁 | | Available Credit: | \$0.00 |
| | | | | | | Account Balance: | \$0.00 |
| ** No City | , 99999 | | - No | City **, 99999 | | Deferred Balance: | \$0.00 |
| Subtotal: Ticket Fees Service Fee Order Fees: Delivery Fee Donations: Tax: Order Total: | S: ES: | | 45.00 60.00 60.00 60.00 60.00 60.00 60.00 60.00 45.00 | | | | |
|] Hide this wi | ndow | View Aga | sin | Print Receipts | Print at Home | Order Confirmation | ОК |

18. Click "Order Confirmation" to start the confirmation process.

| and the second second second | [| | | 1 million 10 million 1 | |
|------------------------------|------------|----------------|---------------|--|----|
| Hide this window | View Again | Print Receipts | Print at Home | Order Confirmation | OK |

19. Once you click **Order Confirmation** the **Order Confirmation Options** box will pop up. Make sure the email address is correct, add any message you want to appear on the confirmation email and click **"Send Confirmation"** to email them their confirmation receipt.

| riease cilo | use what you want to | do with this order confirm | nduon. |
|-------------|----------------------|----------------------------|--------|
| Send To: | noreply@agiletix.co | m | ~ |
| Message: | Thank you for your | membership order. | ¢ |
| | | | ~ |
| Open PDF | F Open Web | Send Confirmation | Close |

(Image 15)